



CHURCH OF THE NAZARENE

PENSIONS AND BENEFITS ADMINISTRATION REDUCES RELIANCE ON MANUAL PROCESSES

More than 14,000 ministers, church-employed lay people and their families rely on the Church of the Nazarene Pensions and Benefits USA (Kansas City, MO) to provide life, disability and retirement benefit plans at not-for-profit rates. Between \$25 million and \$30 million is paid out in plan benefits each year. With a commitment to "serving those who serve," the Pensions and Benefits Administrative Services staff provides tax resources, keeps Pensions and Benefits office personnel records, coordinates Pensions and Benefits office records with ministerial records compiled by the General Secretary's Office and tracks information from the General Treasurer's Office concerning payments to the Pensions and Benefits Fund.

In order to fulfill these mandates more efficiently and cost-effectively, the Administrative Services Office implemented an enterprise content management (ECM) solution to reduce reliance on paper, support Web delivery of documents and provide even more timely service. After working with a consultant to create criteria for evaluation, the Church of the Nazarene chose an OnBase solution implemented by Cutting Edge Solutions, an authorized OnBase solution provider. Developed by Hyland Software, OnBase is an integrated suite of ECM software solutions, including core capabilities in document imaging and management, workflow, COLD/ERM and records management.

"There wasn't any one thing that prompted us to seek a solution, but a little of everything," recalls Reverend Stephen Smith, technology resources manager for the Pensions and Benefits USA. "A computer and security study for the entire campus confirmed that the benefits of a document imaging solution would be worth the costs. Ultimately, we need to do everything we can to look out for our ministers."

DOCUMENT IMAGING INCREASES ACCESSIBILITY

During a nine-month period, Pensions and Benefits scanned documents for 15,000 ministers (about 38 filing cabinets' worth)

and imported them into its OnBase repository without adding dedicated scanning personnel. The mainstay of the Pension and Benefits staff's daily work, this historical file can now be immediately accessed directly from the employee benefits administration application. The easily configurable OnBase Application Enabler™ allows Pensions and Benefits to link documents to relevant screens in the admin system. For example, an employee may want to look up the beneficiary form for a specific account. With a click of the mouse, that document can be retrieved from OnBase without leaving the admin system. "It's like going over the filing cabinet and retrieving the file without having to leave your desk," comments Rev. Smith.

New documents are constantly being added to these files in a variety of ways with minimal effort. Incoming paper documents are scanned by the employees who process them using an fi-5650 document scanner from Fujitsu Computer Products of America. For instance, the employee who administers 403(b)s (the equivalent of a 401(k) for schools, universities and non profit organizations) deals with a handful of the dozens of document types, such as requests, distributions and terminations. S/he preps the documents and scans them, providing indexing values when necessary and making them a part of the historical file.

In addition to documents originating on paper, electronic documents can now be more easily incorporated into this file. Using the Integration for Microsoft Outlook®, e-mails and/or attachments can be easily dragged and dropped into a minister's OnBase file. Following a billing cycle, batches of about 2,000 bills are imported into OnBase as references using bar coding. Pensions and Benefits also makes extensive use of the Virtual Print Driver, which allows users to "print" practically any document, such as correspondence created in Microsoft Word, into OnBase.

AT A GLANCE

Reducing reliance on paper-based processes helps the Church of the Nazarene's Pensions and Benefits USA operate more efficiently and better fulfill its commitment to the thousands of ministers it serves.

BENEFITS

- Provides management with greater visibility into processes
- Improves customer service through immediate access to documents
- Minimizes training requirements through integration with existing applications
- Contributes to strategy to deliver documents via the Web
- Reduces costs associated with copying, printing, filing and storing paper documents
- Delivers instant document access to multiple users simultaneously, including off-site employees
- Supports disaster recovery/business continuity initiatives

APPLICATION

- Pensions and Benefits Administration

COMPLEMENTARY PRODUCT INTEGRATIONS

- Benefits administration application running on IBM® iSeries
- Fujitsu Computer Products of America document scanners

(continued)

The centralized OnBase repository provides Pensions and Benefits with a single location into which all documents can be easily imported and from which they can be easily retrieved. Authorized users can immediately locate the documents they want and print or e-mail them directly from OnBase. When a busy minister calls with a benefits question, s/he can be provided with immediate answers.

Because Pensions and Benefits opted to deploy OnBase as a Web-based solution, superior onsite service is delivered to ministers. "Managers and others have Web access," explains Rev. Smith. "When they travel to meet with a minister, they can pull up the documents from OnBase right there. It really takes the office to the field."

ENHANCING COLLABORATION AND VISIBILITY WITH WORKFLOW

The ability to store and retrieve diverse documents in an organized way is just the beginning when it comes to the advantages of an OnBase solution. The church's Pensions and Benefits Administration has also automated several workflows to move away from paper, improve collaborative processes and increase management visibility.

For example, about 25 people are involved in responding to a death notice in order to ensure that all benefits and benevolences are processed accurately. There are often multiple insurance policies, pension plans and 403(b)s, some provided by the church and some optionally purchased. "In the past, when a death notice was filled out, practically everyone had to touch it," Rev. Smith notes. "Each person would make a copy to complete their work and pass it around. The amount of paper exploded as it walked around the office. In the end, there may have been a file of 50 to 60 pages, and 15 of them would be the same document."

To maintain the high level of accuracy and simplify the process, Pensions and Benefits worked with Cutting Edge Solutions to create a workflow that is kicked off when the death notice is received. Based on the answers to certain questions, the death notice is routed throughout the system, including placement in various queues to generate letters or responses. The initial notification makes its way through the office in about eight hours, but speed isn't an issue. In fact, delays are built into the system out of sensitivity for the family.

Other processes that have been automated using OnBase Workflow include applications for emergency medical assistance and 403(b) withdrawals or distributions. Reducing reliance on manual processes saves labor and resources,

relieving the staff and verifying that Pensions and Benefits is fulfilling its mandate as stewards of the funds with which it is entrusted by ministers, churches and districts. This year, auditors will be provided with access to OnBase to facilitate their research.

COST-EFFECTIVE SOLUTION EASILY ADDRESSES MULTIPLE NEEDS

According to Rev. Smith, the existing OnBase solution will help the church meet additional challenges in the future. In addition to using OnBase to facilitate delivery of Pensions and Benefits documents via the Web, the church is also developing solutions for other departments.

The General Treasurer is implementing a solution that will also incorporate forms processing technology from Datacap Inc. and nonprofit financial management software from Blackbaud. The IT Department is beginning to evaluate uses for OnBase, including scanning and managing service agreements.

OnBase is also becoming an integral part of Pensions and Benefits' disaster recovery strategy. "What prompted us to consider document imaging was the realization that we were one sprinkler malfunction away from having a huge mess," Rev. Smith comments. "When we had a meltdown with the main server about two months ago, OnBase was the only thing running because we had a second copy running on a second box. That experience accentuated the need to keep OnBase up and running." Backup CDs are generated using OnBase CD Authoring, and the church works with Hyland Software to ensure that these backups are always restorable by contracting with OnBase Database Validation Services.

Despite the many current and future benefits, OnBase makes very little demand on the human, IT or administrative resources. "It's hard to quantify the benefits, but we have reduced our reliance on paperwork which helps us save time," says Reverend Smith. "Our staff really likes OnBase, and it is being utilized. When someone calls with a question, being able to access the file from OnBase eliminates the need to call people back."

Yet despite the volume of documents being stored, OnBase doesn't demand as much "overhead" as might be expected. "When the main file server was running out of space, a committee created a graph depicting which department was using the most space," Rev. Smith reports. "The suspicion was that it would be Pensions and Benefits because of OnBase, but it didn't even appear as a sliver. The IT manager said it's because OnBase does such a good job keeping file size down."

Because OnBase is so easy to administer, Rev. Smith is able to manage the system with minimal time commitment compared to his many other duties. However, he admits that local reseller support is critical to that success. "I don't know how we would we would have been able to implement OnBase without a local relationship," he says. "If we didn't have an integrator nearby, we might have needed a dedicated OnBase administrator. I can't imagine that we could justify the expense of flying someone out to help us when we needed it." Hyland's network of authorized OnBase solution providers delivers the benefits of local service to nearly every part of the U.S. as well as Canada, Latin America, Europe and Asia.

Rapidly deployable and easy to administer, OnBase provides reliable, cost-effective solutions for enterprises of all of types, including nonprofits. This allows organizations like Church of the Nazarene Pensions and Benefits to continue their important work as stewards for thousands of families and the missions they fulfill.

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